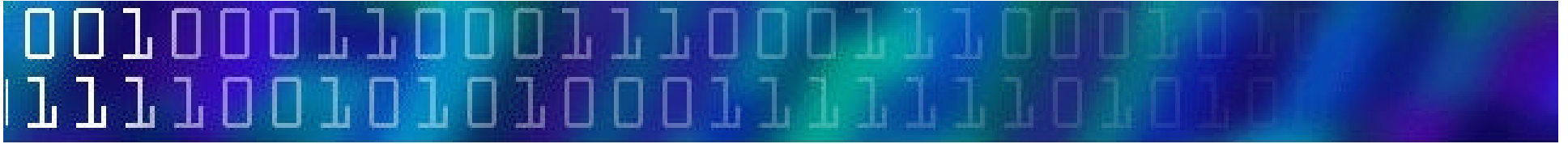


APPENDIX A-2





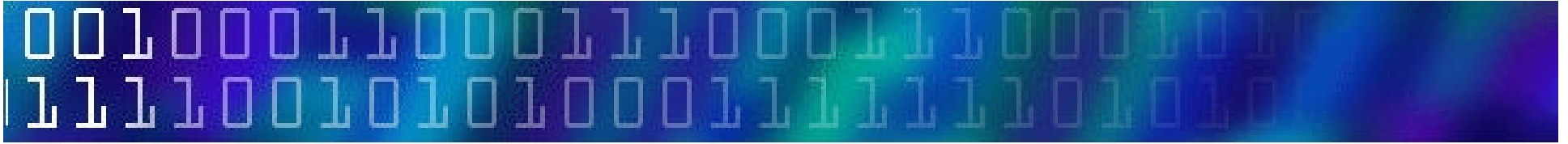
MASFAA Leadership Conference

May 18, 2000

Kay Jacks

General Manager, Schools Channel

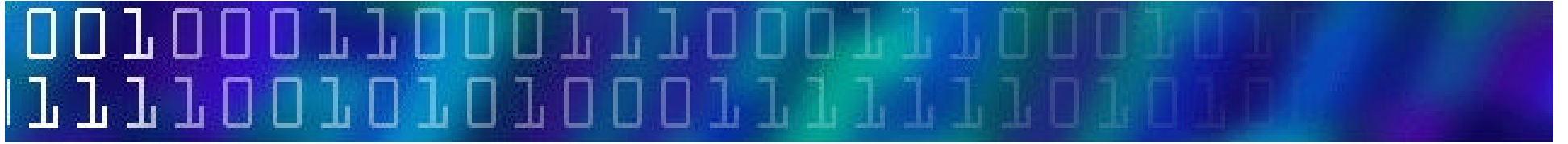




3 CONCURRENT ACTIVITIES

- ①** Portals
- ②** Review of Edits
- ③** Common Origination and Disbursement





School Portal Initiative



SFA Schools Portal

Welcome, Ann Marie! 1:42 PM - 12/14/99

File Edit View Go Communicator Help

Bookmarks Go to: <http://schools.sfa.gov>

Advertisement

DELL announces
10% discount for students!

Records Products Services Systems Forms/Pubs Training DL News Help

Search SFA for **Forms and Publications** containing

My Shortcuts

- [Technical Resource Library](#)
- [Compile FISAP](#)
- [Direct Loan Bulletins](#)
- [NASFAA](#)

My Views

Functions and Views	View
Loan Origination	
Loan Counseling	
Student Records	
Financial Aid System	
Bursar/Business Office	

SFA - We're Here To Help

- [Download SFA Coach](#)
- [Register with SFA University](#)
- [Chat with SFA](#)
- [Send SFA E-Mail](#)

Today's Headlines

- [SFA Announces Eliminates Mid-year FAT](#)
- [Entrance Counseling Results Sent to Schools Electronically](#)
- [DL System Live for 2000-2001](#)

SSN Verification

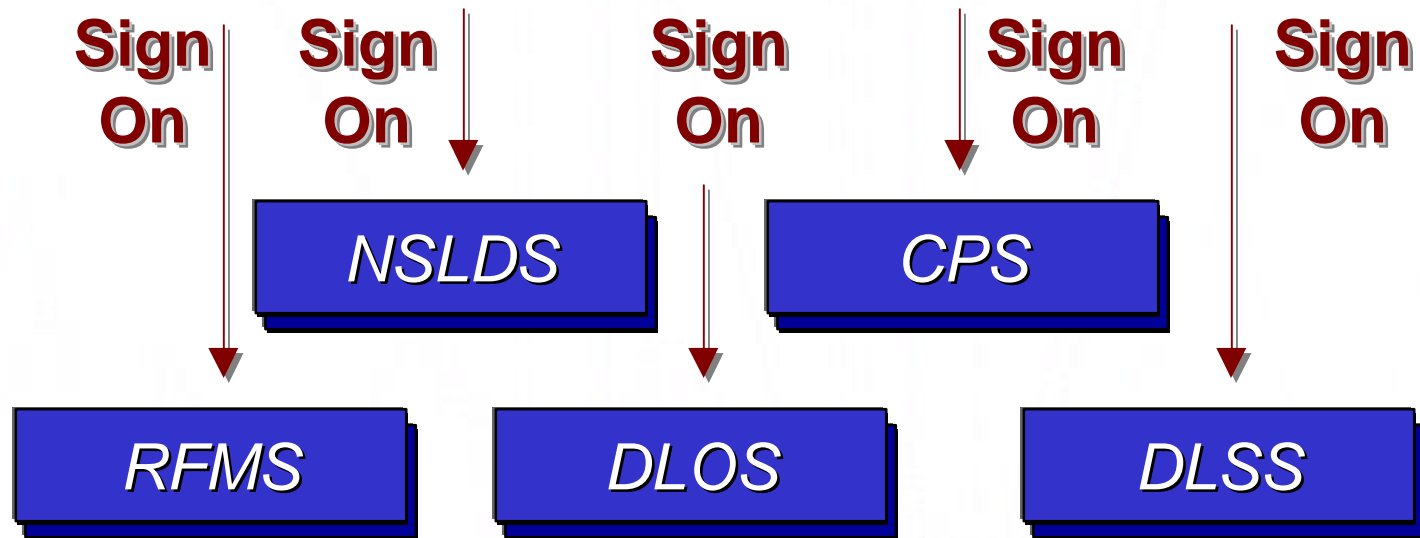
EFC Verification

"We help put America through school."

SFA Schools Portal, Version 0.0

Portal - Version 1.0, Sept. 2000

- ✓ “Baby” customization (by school)
- ✓ Home Page to manage content
- ✓ Links to all existing SFA web-sites
- ✓ Links to all web-enabled operating systems
- ✓ Document and “Key Word” search
- ✓ Feedback loop




◆ **Calendar**

◆ **ED/ SFA News**

◆ **System Alerts**

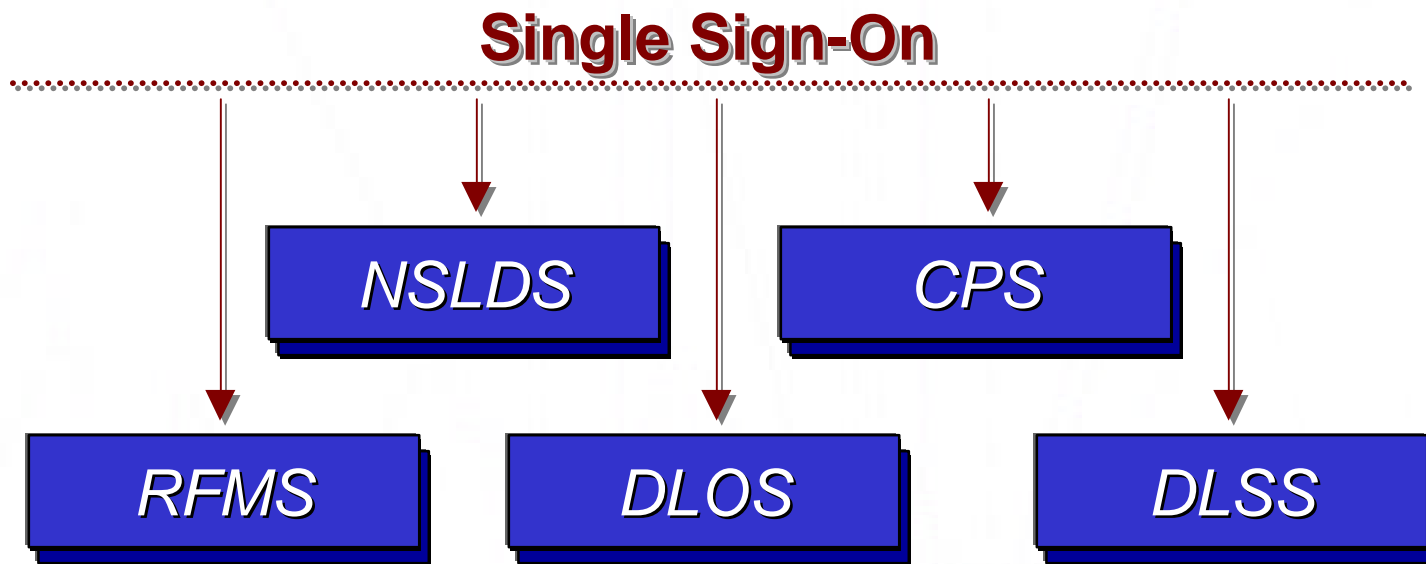
◆ **“My Shortcuts”**

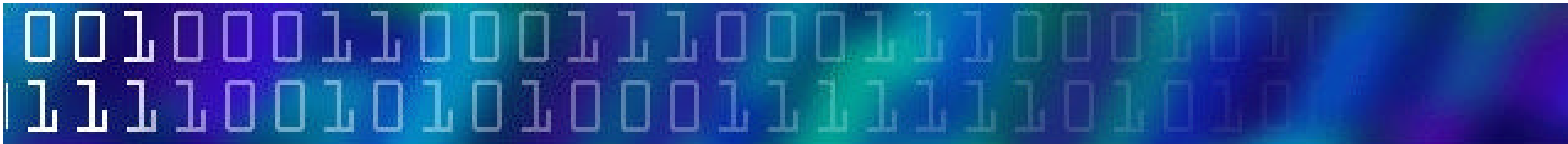
◆ **Content Management (examples)**

- ✓ Review or Submit Student Records (link to RFMS, LOS, NSLDS)
 - ✓ Book Store (order documents, materials, use SFA Download)
 - ✓ Training/Conferences (link to SFA Coach, Conferences Sites)
 - ✓ On Line Library (link to IFAP documents)
 - ✓ Funding (link to GAPS)
 - ✓ Contact Us (send e-mail, access lists of current phone numbers)
 - ✓ Program Participation (link to E-App, PEPS on the Web)
- 

Portal - Version 2.0 TBD

- ✓ Increased customization
- ✓ Ability to set up variety of user types
- ✓ Single sign-on to operating systems





COMMON ORIGINATION AND DISBURSEMENT

A Conceptual Design for
Pell, Direct Loans, and Campus-Based



Current Processes...

- Time focused on managing systems not serving students
- Inadequate access to student and school data
- Don't support full integrity of the programs
- Cost us \$427 million





Where We Are Going


Common Process...

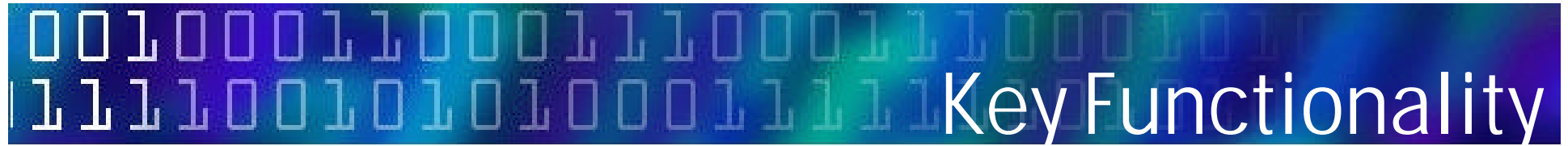
- Common process for Pell, Direct Loans and campus-based funds
- Full access to data for those with a right to know
- Best possible source as close to real time as possible
- Pilot for 2002-03 roll-out





Design Principles

- Common definitions
 - Shared data definitions across programs
 - Common core processes: originating, reporting, reconciliation
 - Best data
 - From best possible source, eliminating redundancies
 - Easy Access
 - Internet-Based
 - Leverage latest technology for seamless interfaces
 - Edits focused on data integrity/compliance
 - Same edits across programs
 - Elimination of intra-system edits
- 



Key Functionality

- ✓ Access to student history data
- ✓ Access to institutional research data
- ✓ Utilization of a common process for all programs





Key Functionality

- ✓ Access to student history data
 - All Title IV received
 - Similar to data currently on FATs/ NSLDS
 - Reduces steps to find student level data
 - Accessible via security by student, school, etc
(all with “right to know”)




Your Student Statement - Netscape

File Edit View Go Communicator Help

Back Forward **Reload** Home Search Netscape Print Security Shop Stop

Bookmarks Location: <http://highway1dev/Links/hiway2.html> What's Related

THE REGGAE SOUR Jamdown.com Netscape Netcen washingtonpost. SFA Technical S Netcenter North American

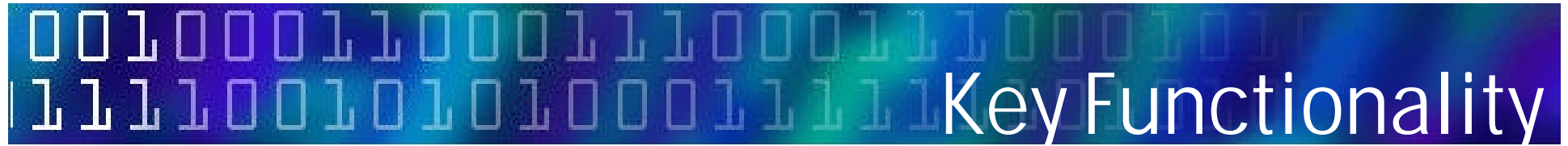


Student History

Summary Financial Information:

Total Federal Pell Grants Received:	\$7,522	More info
Total Federal Direct Loans Received:	\$17,125	More info
Total Federal Family Education Loans Received:	\$5,222	More info
Total	\$29,869	

Total Federal Direct Loan Remaining to be Paid:	\$16,725	
Total Federal Family Education Loans Remaining to be Paid:	\$4,822	



Key Functionality

- ✓ Access to institutional research data
 - Ability to download, query and format data
 - Supports common data sets for institutional reporting
 - Allows benchmarking



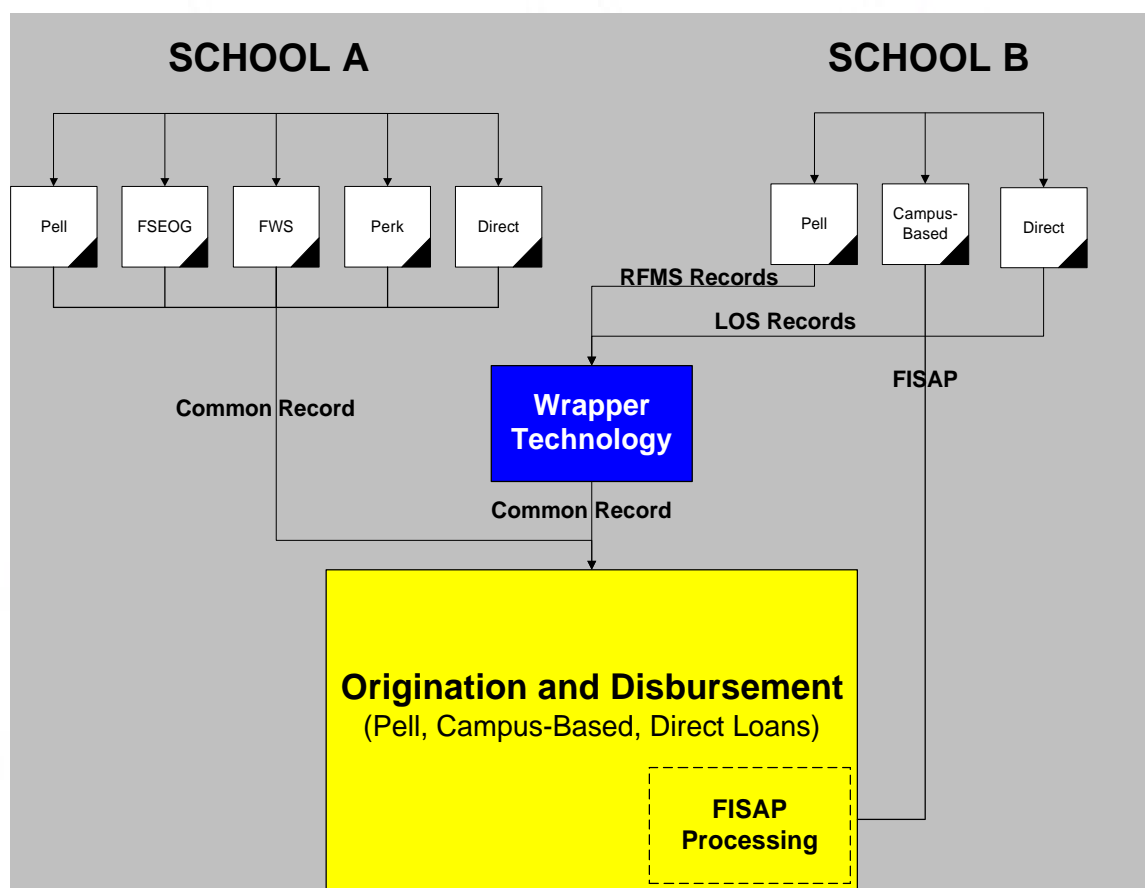
1 Create Common Payment Request Record

- The institution creates a single Title IV Common Payment Request Record for each eligible student
- This record contains a student identifier and data needed to request payment for Title IV programs.

Student Identifier	Last Name	First Name	Middle Initial	Street Address	Pell	DL	Campus Based	...
--------------------	-----------	------------	----------------	----------------	------	----	--------------	-----

Flexibility

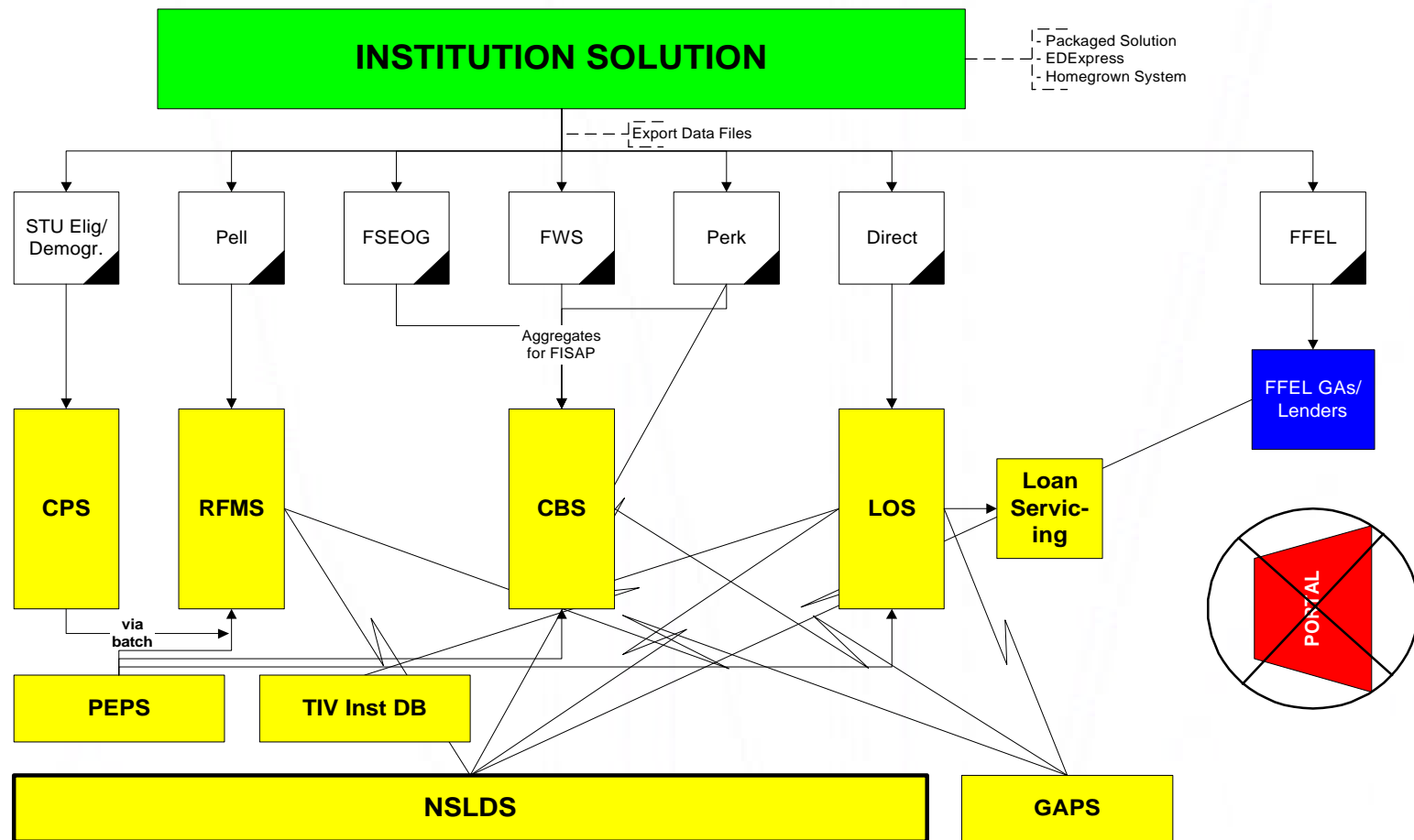
- SFA will develop middleware to accept current record layouts, allowing schools to migrate to common record as they are ready



- Year-end student detail reporting for Campus Based programs
- Funding Method Options for Pell & Direct Loan



Current Systems without Middleware

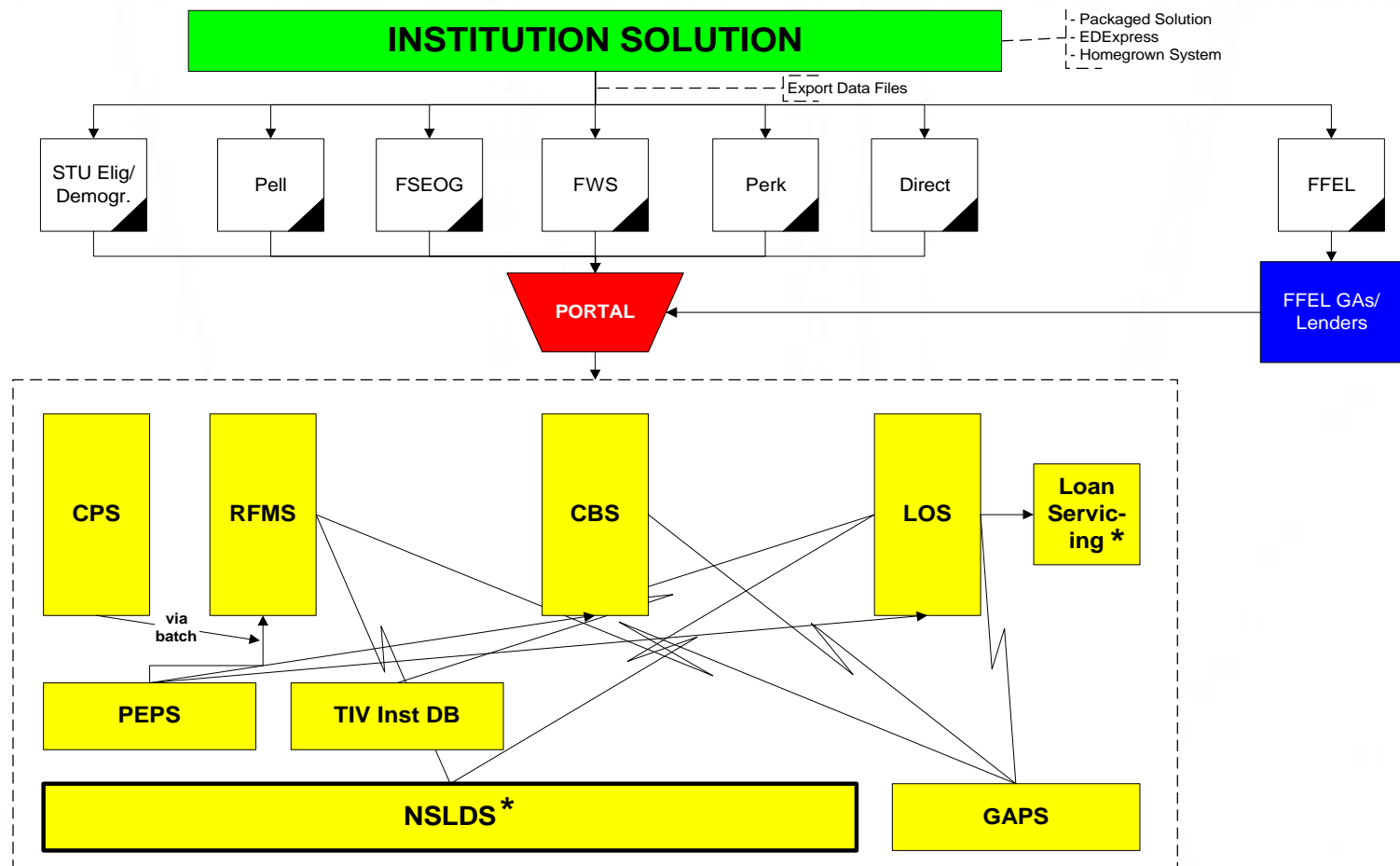


- varying business rules
- four distinct processes at schools and ED
- lost data/ data "chasing" (students, schools, ED)
- moving data via batch as opposed to data sharing
- redundant data and conflicting data

- no common edits
- few systems share data

- no "whole picture" for students, schools, ED

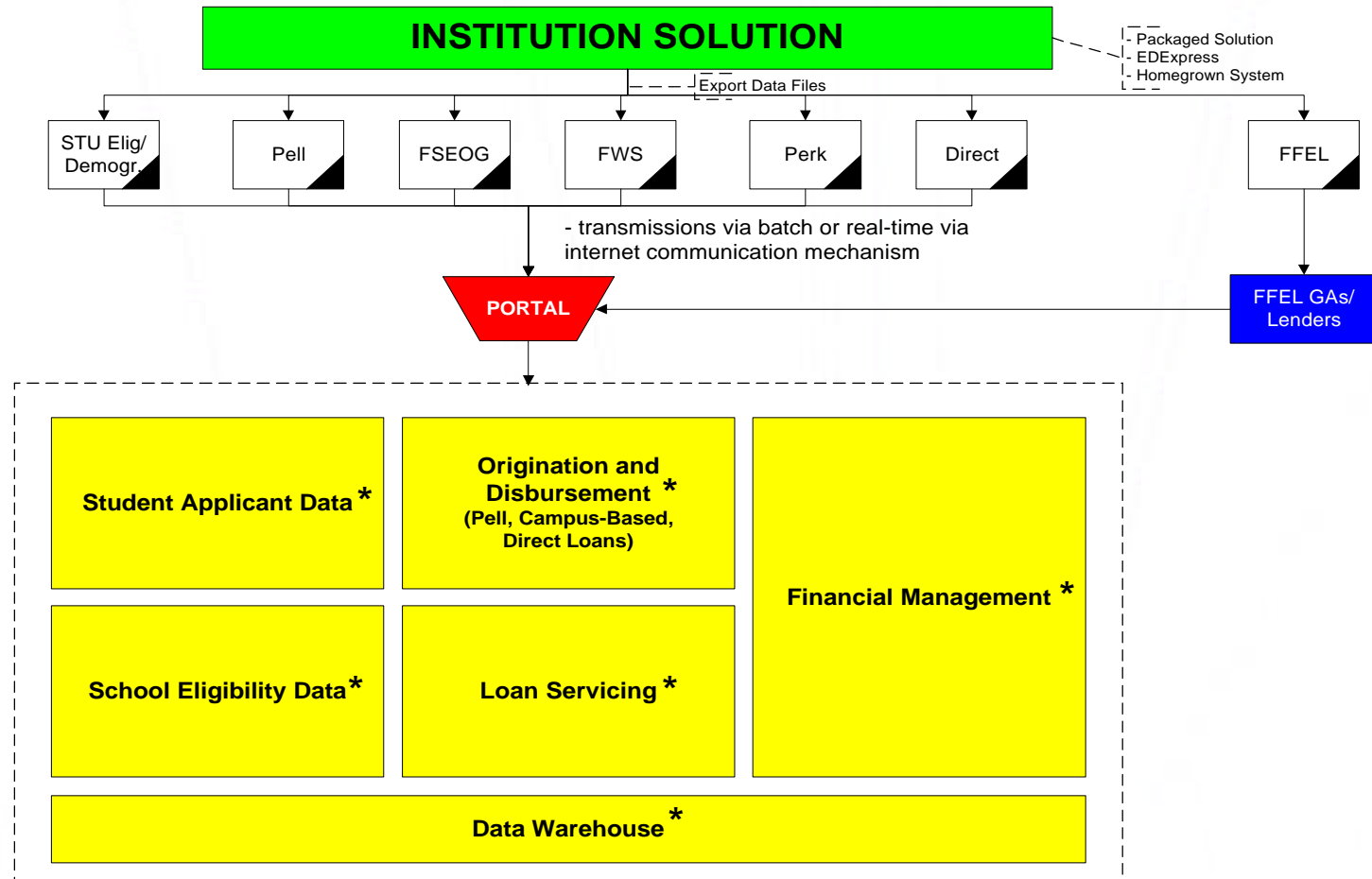
Current Systems with Middleware



- varying business rules
- four distinct processes at schools and ED
- data 'fetching' as opposed to data sharing
- redundant data and conflicting data
- no common edits
- will not effectively support data warehouse

- "whole picture" for students, schools, ED
 - systems providing data to portal noted by "*"
 - not real-time
 - data integrity issues

Reengineered Systems with Middleware

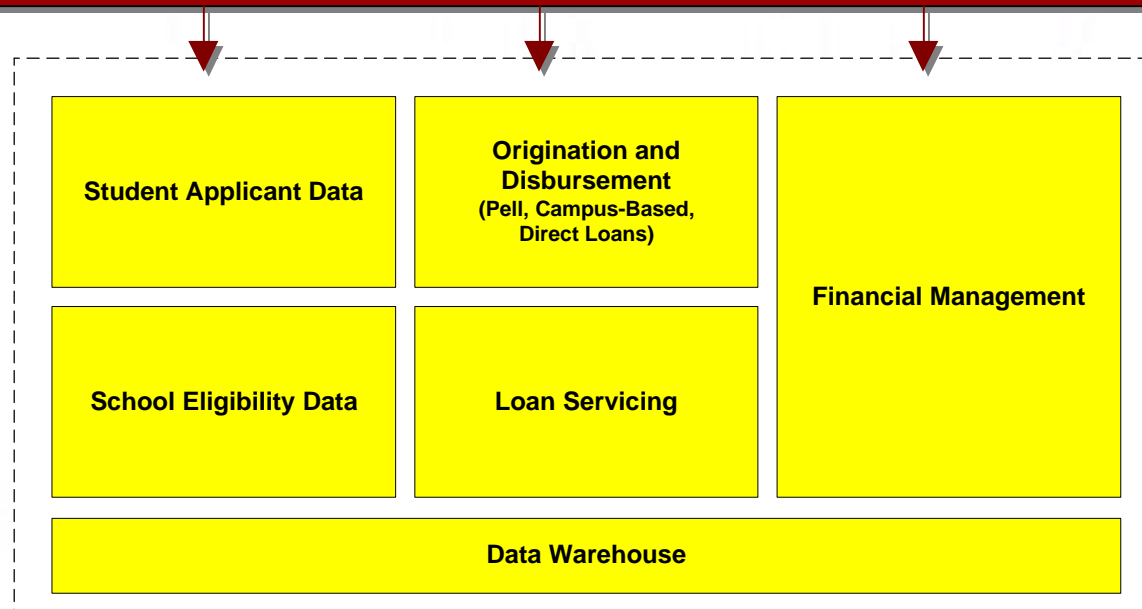


- data stored once, aligned with business practices
- real-time data sharing without data transfer
- real-time, continuous tracking of data
- real-time, continuous validity checking
- common edits across program when necessary

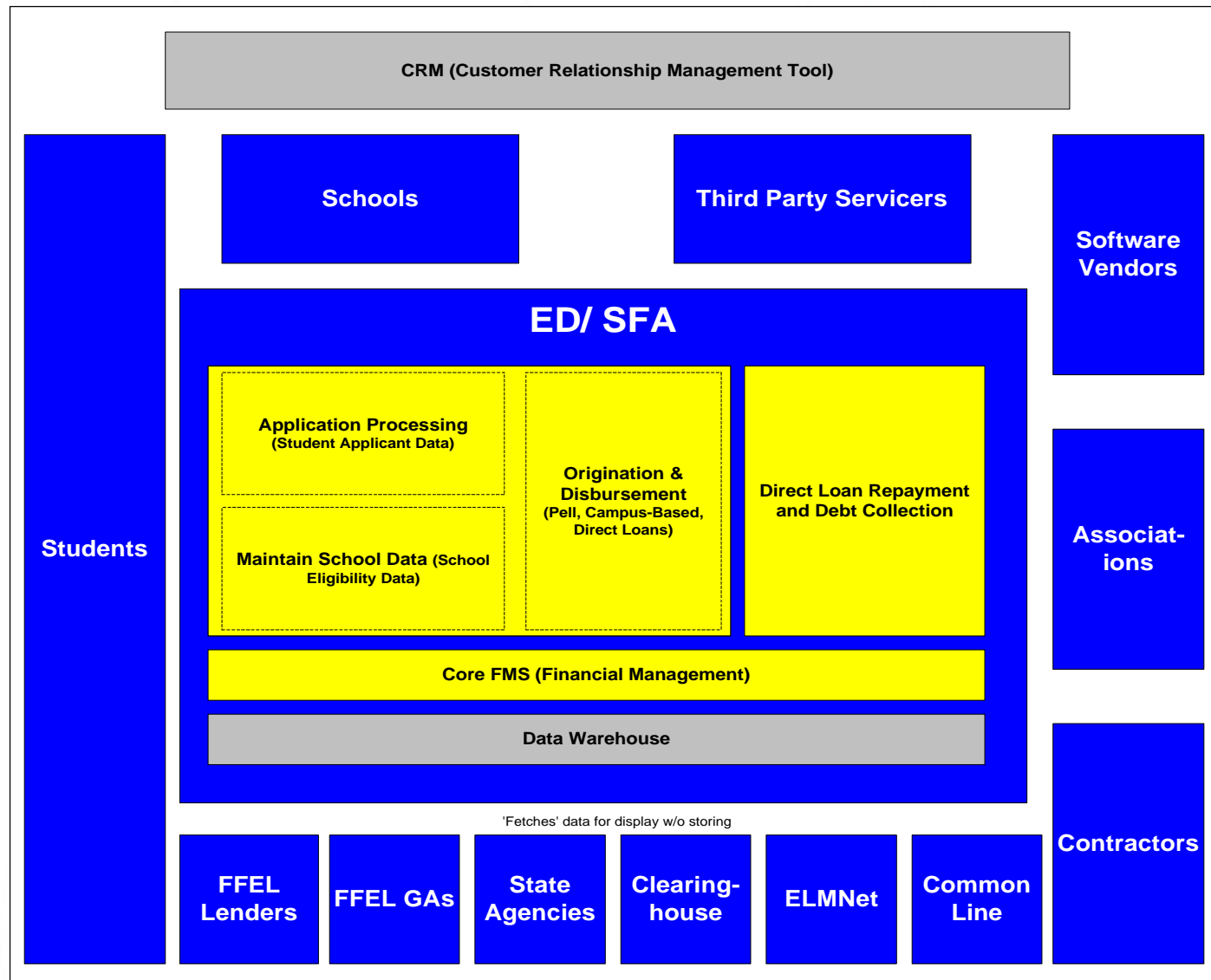
- portal "points" users to best source
- one process for getting funds for schools
- **real-time, accurate "whole picture" for students, schools, ED/ SFA**
- **systems that will provide data to portal noted with "*"**

Portal - Desired Outcome

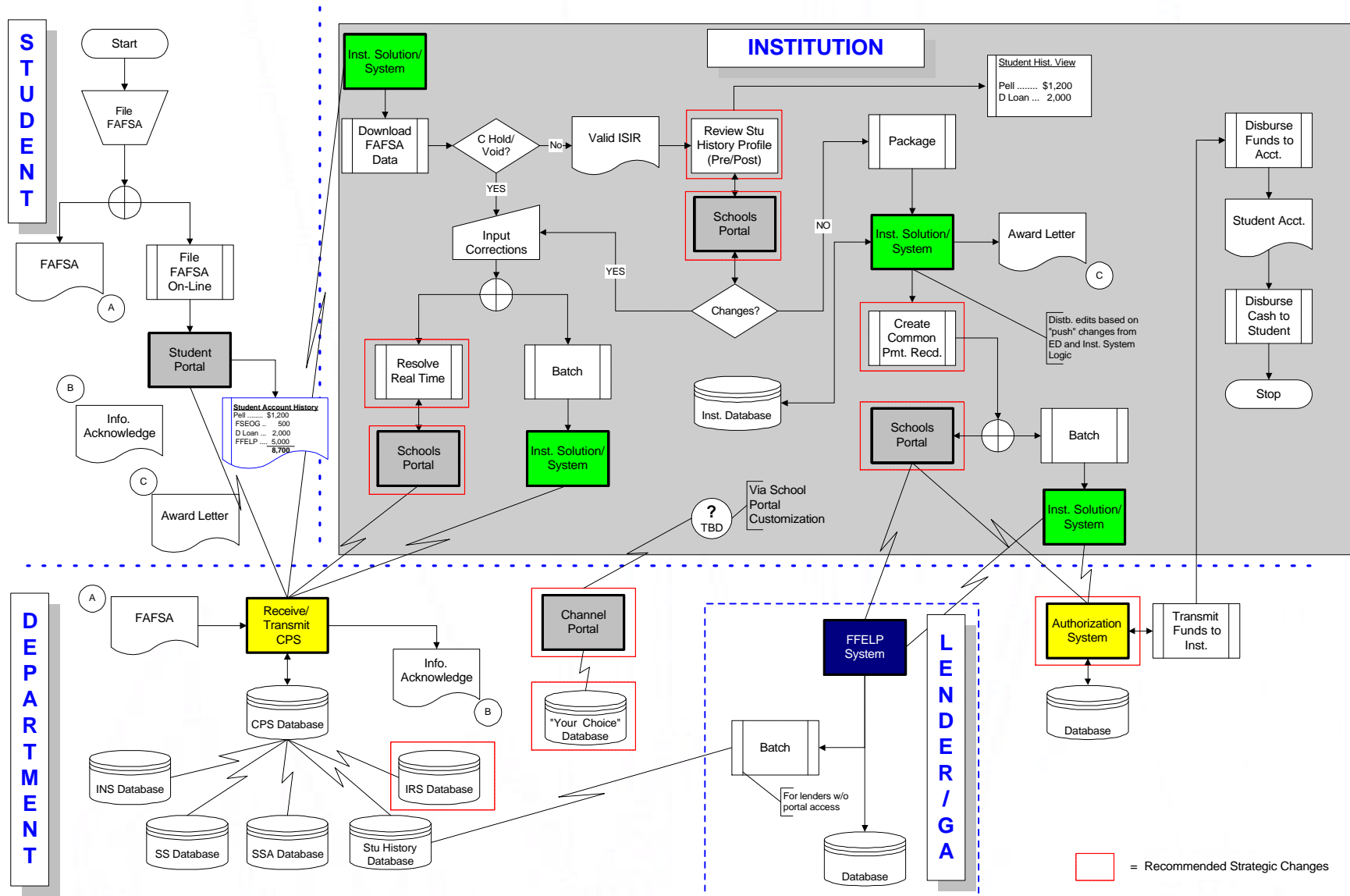
- ✓ Customization by single user
- ✓ Direct interface with operating systems
- ✓ Access to query, download from operating systems and data warehouse
- ✓ Ability to create data marts for analysis



Virtual SFA



Conceptual Model: Common Process

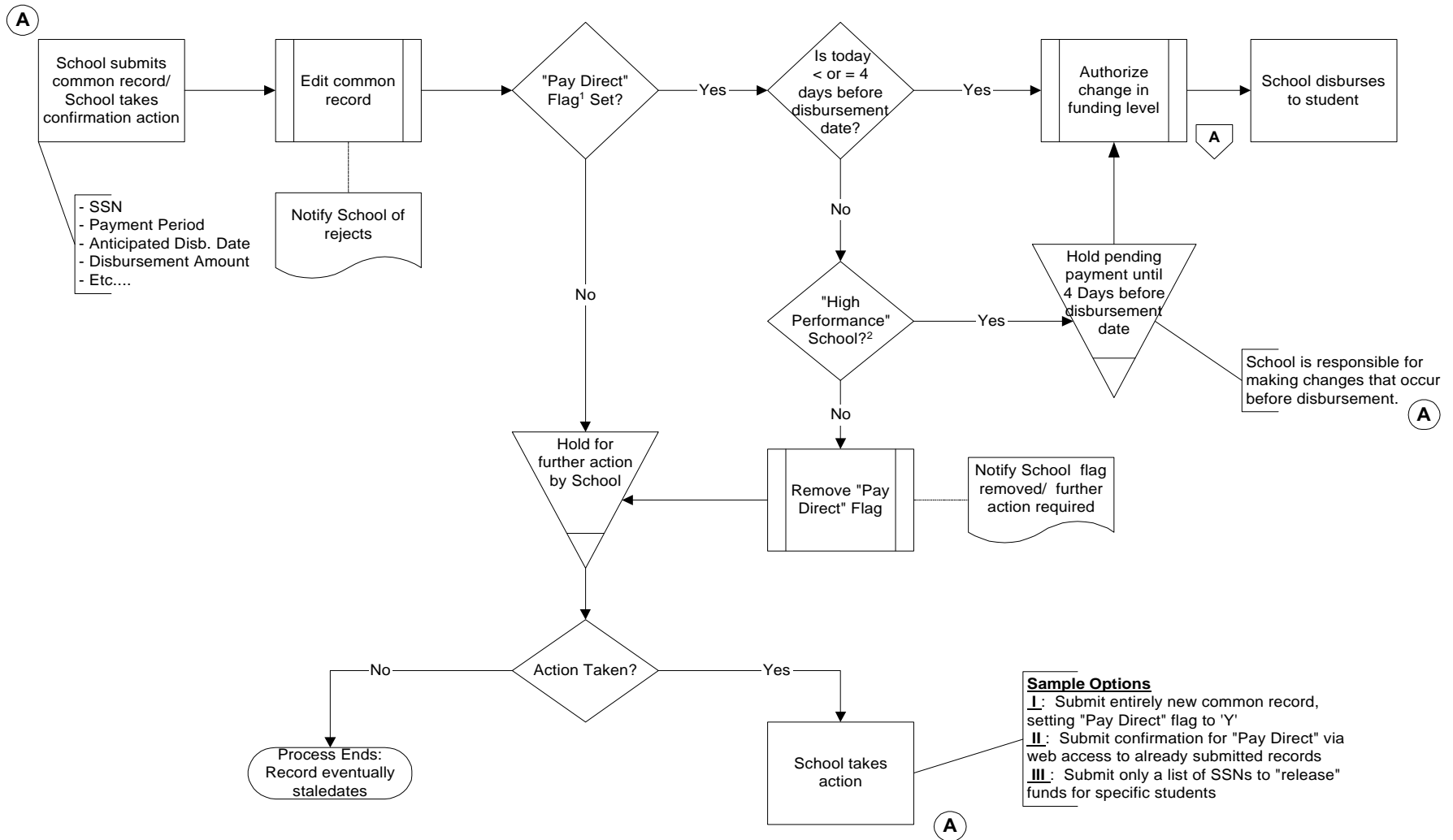




What incentives could SFA offer to institutions to encourage Just in Time reporting and payment processing?

What “options” in origination and disbursement would be the most important to you?

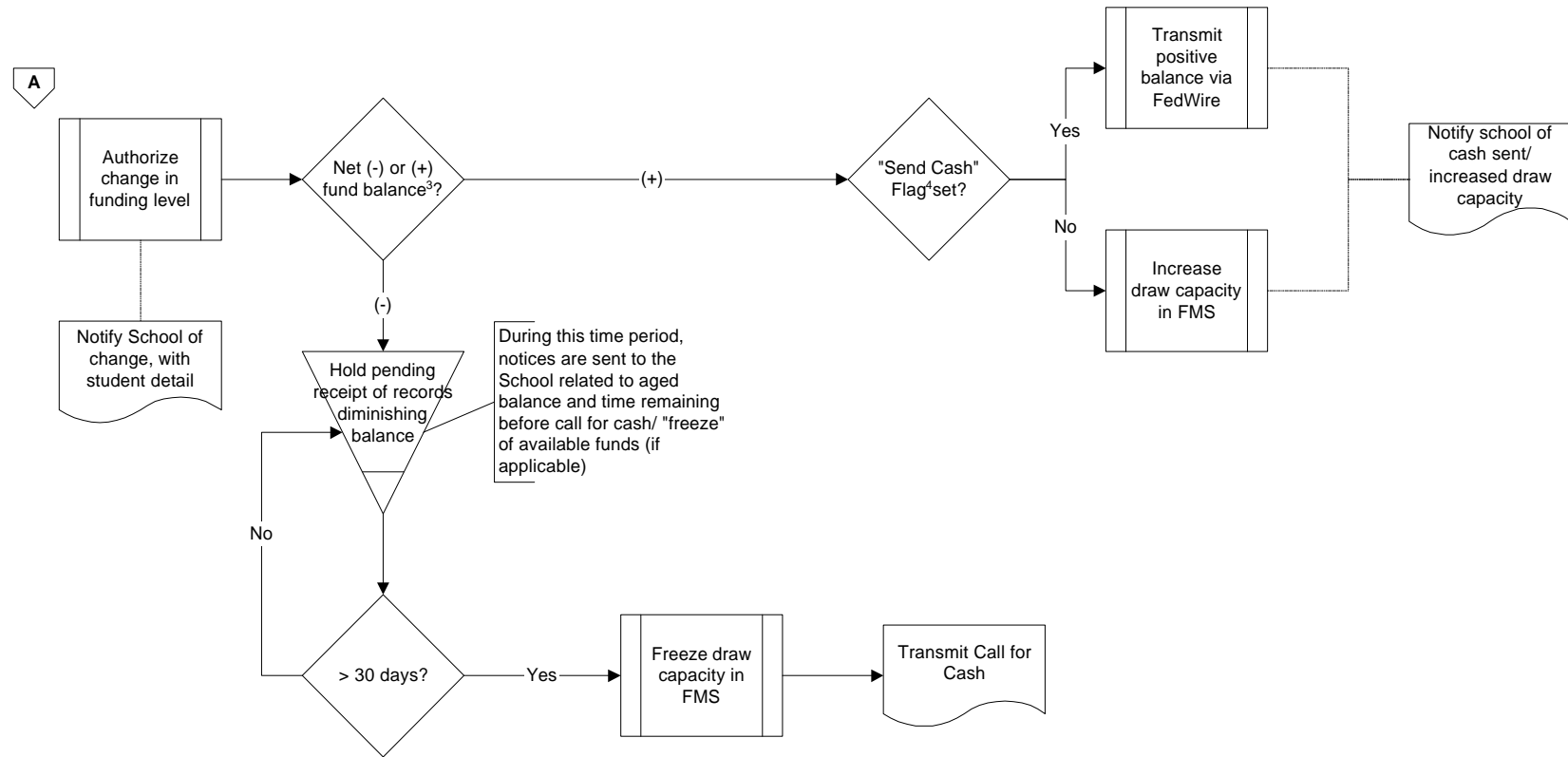
FUNDING OPTIONS



¹ "Pay Direct" Flag allows the school to indicate they want direct payment for this record without additional action. This is available for all schools within a 4-day window of their disbursement date. Outside this timeframe, it is only available for high performance schools.

² There will be specific rules established for determining whether a school is "high performing". Performance will be based on measurements such as how the School has demonstrated its ability to submit records and account for cash.

Sub-Process: Authorize Change in Funding Level



³ Based on their "credit limit," a School may have access to Treasury funds via drawdown prior to reporting records, if this is the case, this decision point calculates whether total accepted records exceeds amount drawn to date.

⁴ Schools will be able to set whether they want approved increases to their available balance to be sent directly via FedWire or made available in FMS for immediate drawdown. Schools can change this option at any time.

What are the benefits to you/
your students of a common
record across all Title IV
programs?

Of a common process for
reporting and payment?

What changes would you make to the FAFSA?

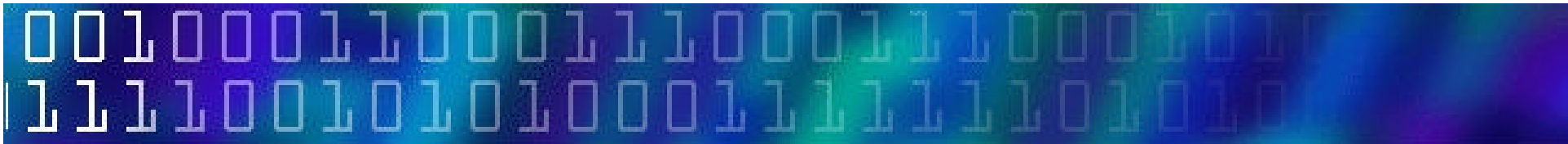
FAFSA edits at CPS?

What is your reaction to covering students failing to complete all their classes in a given term under failure to maintain SAP instead of the current “unofficial withdrawal”

If you had a virtual student history, how would you feel about active confirmation of P-notes

What experimental site authority would you add if you could?

- If you could eliminate any one regulation/ requirement, what would it be? (each group should come up with a 'short list' as well as their decided one pick)
- What incentives could SFA offer to institutions to encourage Just in Time reporting and payment processing?
- What "options" in origination and disbursement would be the most important to you?
- What are the benefits to you/ your students of a common record across all Title IV programs? Of a common process for reporting and payment?
- What changes would you make to the FAFSA? FAFSA edits at CPS?
- What is your reaction to covering students failing to complete all their classes in a given term under failure to maintain SAP instead of the current "unofficial withdrawal"
- If you had a virtual student history, how would you feel about active confirmation of P-notes
- What experimental site authority would you add if you could?



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